LPL Financial Welcomes Father-Son Team, Steve and Jeremy Friedman

Feb 2, 2022

CHARLOTTE, N.C., Feb. 02, 2022 (GLOBE NEWSWIRE) -- LPL Financial LLC (Nasdaq: LPLA) announced today that father and son financial advisors Steve and Jeremy Friedman have joined LPL Financial's broker-dealer, hybrid registered investment advisor (RIA) and custodial platforms, aligned with Silverleaf Wealth Management, an existing LPL firm. The father-son team joins from Raymond James and reported to LPL it served approximately $200 million in advisory, brokerage and retirement plan assets*.

Collectively, the pair brings more than 60 years of experience supporting a variety of clients through customized investment and wealth management strategies that address their unique needs. With a background in information technology, Jeremy grew up watching his father make a difference in the lives of business owners, corporate executives, healthcare professionals, families and retirees by helping them work toward their dreams through personalized financial planning. He later went on to work alongside Steve before ultimately taking on a lead role in their practice in 2014.

"As a family team that has worked together for over a decade, my father and I are in lock step about what it means to be a financial partner," Jeremy said. "We've known many of our clients for years and find great fulfilment in helping them work toward their goals and financial milestones."

In considering how to provide their clients with the best possible resources to serve their financial objectives, Jeremy and his father determined they needed a more flexible business model, turning Silverleaf and LPL for the next chapter of their journey.

"Ever since I was a child, it's been my dream to own my life's work – and this move to Silverleaf, accompanied by the backing of LPL, will allow me to do exactly that," Jeremy said. "LPL offers the flexibility to run my business the way I want to and serve our clients' comprehensive financial needs. Clients want a holistic approach to their finances, and with the ability to tap into experts such as CPAs and attorneys, I can give my clients differentiated service experiences and the attention they deserve."

Justin Gibson, president of Silverleaf Wealth Management, said, "We're thrilled to welcome Jeremy and Steve to the family, and are honored they turned to us as they evolve their practice. At Silverleaf, we believe our teamwork approach adds a broader perspective to all we do and provides increased benefits to our advisors and clients. Together with LPL, we will work hard to support the Friedman team as they expand their business and continue to provide their clientele base with exceptional care and attention."

Scott Posner, LPL executive vice president, Business Development, said, "We extend a warm welcome to Jeremy and Steve, and a hearty congratulations to Silverleaf on adding two quality financial advisors to their network. We're confident that LPL's innovative technology and differentiated service experiences will provide a sound foundation for Jeremy and Steve's continued growth. We look forward to a long-lasting and successful partnership with them and the Silverleaf team."

Advisors, find an LPL business development representative near you.

About LPL Financial
LPL Financial (Nasdaq: LPLA) was founded on the principle that the firm should work for the advisor, and not the other way around. Today, LPL is a leader** in the markets we serve, supporting more than 19,000 financial advisors, 800 institution-based investment programs and 450 independent RIA firms nationwide. We are steadfast in our commitment to the advisor-centered model and the belief that Americans deserve access to personalized guidance from a financial advisor. At LPL, independence means that advisors have the freedom they deserve to choose the business model, services, and technology resources that allow them to run their perfect practice. And they have the freedom to manage their client relationships, because they know their clients best. Simply put, we take care of our advisors, so they can take care of their clients.

* Value approximated based on asset and holding details provided to LPL from the year 2021

*** Top RIA custodian (Cerulli Associates, 2020 U.S. RIA Marketplace Report); No. 1 Independent Broker-Dealer in the U.S. (Based on total revenues, Financial Planning magazine 1996-2021); No. 1 provider of third-party brokerage services to banks and credit unions (2020-2021 Kehrer Bielan Research & Consulting Annual TPM Report); Fortune 500 as of June 2021*

**** As of 3/19/21 - based on reported Assets Under Management by Silverleaf Advisor Group - a registered investment advisor.*

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